Enhancing Practice Group Performance – Part 1: Running Effective Practice Group Meetings

By Susan Raridon Lambreth on October 11, 2021

There's a war for talent and many of the best law firms are winning. That's why it's critically important to engage your practice group members. One of the seemingly mundane but highly important tasks of a practice leader is to conduct effective group meetings. Well executed, they fire up the troops and create energy. Done poorly? You risk losing the hearts and minds of your practice group members.

Our research indicates that in the strongest practice groups, these meetings occur at least monthly. And, they are focused on the business of the group. Here are eight keys you can use to optimize your meetings.

1: Stick to the purpose of the meeting.

The primary purpose of practice group meetings is to create cohesion and a sense of shared destiny among group members. It's not about reporting information or tactical implementation, though any of those can be a small part of the meeting time. But leave the training for a dedicated training session.

When you're going for engagement, there are several approaches that work best.

First, it is important to ensure that each group member feels that they are a valuable contributor and that their views matter. One way to do this is to provide positive feedback and recognition to individuals, as well as to the entire group. Allocate time equitably so that the meeting feels jointly owned and not dominated by one or two team members.

Second, limit the group's annual goals to no more than three (see recent blog on Practice Group Strategy). These common goals should be part of the practice group's business plan. Discuss progress, and any challenges the group must overcome.

Three, communicate well. Ensure that you are sharing essential information that the group needs to know and promoting dialogue. Create a safe environment for group members to speak their views on the topics you are discussing. Encourage your group to show appreciation toward one another even when they disagree.

Research shows that people must hear a message multiple times before they take action. So, any essential idea or theme that you relay to your practice group should be communicated in the meeting and repeated in various ways in the future. If it's worth saying, it's worth repeating. Group meetings play an essential role in overall firm communication, as well. There may be messages that firm management wants to reinforce during PG meetings.

Another key purpose for the meetings is to create a "sense of urgency." Urgency is what moves the group from complacency to actual achievement. The best-laid plans aren't just laid; they're executed. So how do you create urgency? Prepare — or better still — have members prepare and report on trends affecting your clients. Also, use client presentations or competitive intelligence about current or aspirational peer firms.

2: Prepare an agenda and circulate it before the meeting.

When you create an agenda, it tells the attendees that you are (a) prepared, (b) take the meeting seriously, and (c) the time spent is highly likely to be productive. Also, an agenda gives group members a fair opportunity to think about critical issues so that they can contribute thoughtfully. Cover top priority items and key messages at the beginning of the meeting while everyone is most alert. A sample agenda is outlined below.

Most Common Successful Agenda Format

- “Good and welfare” – congratulate group members who have a recent accomplishment or significant milestone (i.e., handling first trial, receiving a public honor or ranking, etc.), share other achievements or personal landmarks (birth of a child, recent marriage, etc. – assuming you ask them first if they feel comfortable sharing it more publicly): 5 to 10 minutes
- Implementation of the business plan – key highlights (not roundtable reporting), including new marketing and plan ideas: 20 to 35 minutes
- Reports on accomplishments (on the plan and otherwise) since the last meeting: 5 to 10 minutes
- Discuss significant new clients/matters, how they were developed, what will be done, and by whom: 10 minutes
- Developments in practice, client trends, and short informational segment: 15 to 20 minutes
- Workloads and staffing issues (not a report) – only when it is important to gather feedback from a large number of the group members: 10 minutes max

Obviously, if you go to the high end of these time allotments, your meeting will be over the typicaly hour-long PG meeting so if one topic will be on the longer side, another one should be shorter for that meeting.

3: Plan the meeting in advance.

Successful meetings typically take much longer to prepare than to conduct. To prepare an agenda or invite speakers to the meeting, you’ll need to determine the topics. This should include issues that you know the group should address and other themes or topics that members want to discuss. Enlist help if needed for pre-meeting planning since it is a time-consuming activity. Then, you or your delegate should contact various group members or others outside the group to speak on specific topics.

For example, you might have someone speak about their key learnings from a recent CLE program or trade association meeting they attended or provide a brief synopsis of a significant client project that was recently completed. However, don’t wait until the meeting to call upon members to speak up. You may find that many are unprepared to speak extemporaneously or simply reluctant to speak at all. This can result in a less productive meeting than you anticipated.

4: Let others speak.

We hear practice group members frequently complain that the practice leader does all the talking. Make sure that your speaking time is only a small part of the total meeting. Plan time to solicit input and ideas from others, and not just as an afterthought. In addition to identifying speakers ahead of time to address certain topics, make a note of others you’d like to call upon during the meeting. Of course, encourage members to speak up at any time.

Practice group leaders may believe that they are soliciting sufficient input by asking, “Does anyone have anything to add?” This is not the most effective way to encourage active participation. Use the aforementioned agenda to give others plenty of notice regarding the planned discussion. This will allow them time to think and formulate opinions without the pressure to speak now. For others, let them know ahead of time that you would like them to share their views or get the discussion started.

5: Bring in outside perspectives.

Clients and others outside the firm typically appreciate being asked to participate. Plus, you'll have better attention from your group members at these meetings. Another way to make the meetings interesting and productive is to invite guest speakers from other practice groups or industry leaders. This tends to increase the attendance at meetings, as well.

Depending on the speaker and the topic, outside speakers can help generate the sense of urgency needed to battle the natural complacency many lawyers have about spending time understanding their clients or industries, working toward group goals, or building new practice niches.

Of course, you want to create a safe environment and encourage openness. So, you don't want to have an outsider at every meeting. This tactic works best when limited to every three or four meetings. But, you'll find that having a relative stranger in the room is a great way to shake things up, send some important messages, and generate new enthusiasm.

6: Keep a regular monthly meeting schedule.

In almost 30 years of advising firms on their practice group structures and training practice group leaders, I have never seen a successful practice group that meets less than monthly. Some groups meet more frequently, i.e., weekly or bi-monthly. If you only have one monthly meeting, as mentioned, focus primarily on group business rather than a training or CLE-type meeting. This is not to say that these are not important meetings, as well. But if your practice group is to achieve strong cohesion and successfully implement its plan, a regular, monthly business meeting is critical.

Practice group meetings work best if you establish an annual schedule using a regular interval, such as the third Tuesday of the month at 2 p.m. If your firm has offices in multiple time zones, as most firms do, it is important to be sensitive to the time in each location. For example, do not call it a "lunch" meeting when for a significant number of the people joining via phone or videoconference, it may be breakfast or late in the day.

Publish the schedule a year in advance and stick to it, barring major disasters. If you regularly reschedule or cancel meetings, it tells your members that the time together with them is not important or that group's activities are not as critical as individual concerns.

7: Create a to-do list from each meeting.

For each meeting, the to-do list captures the action steps required going forward, including who will be responsible for each and the target date for completion. This best practice works exceptionally well in combination with an agenda. First, circulate the agenda and the to-do list from the last meeting a few days prior to your upcoming practice group meeting. Then, circulate the updated to-do list right after the meeting.

This way, each group member gets a reminder twice during the month. While this may seem redundant, most lawyers forget about the actions they committed to until the list lands in their email inbox again a few days before the meeting. We find groups typically achieve a higher degree of follow-through when they use this kind of approach. Even better, some firms post these lists on their practice group intranet page or collaboration portal. To-do lists work better than taking detailed minutes which can encourage people to miss the meetings when busy, assuming they can just read the minutes later.

8: Make the meetings interesting.

Stability is comforting during these uncertain pandemic times. For that reason, maintain a consistent format for parts of your meeting. But don't let your meetings become navel-gazing events. Keep the meetings lively by changing them up. Some practice groups meet every other month with all partners and the other meeting with all lawyers. Others invite the paralegals and other professional staff once or twice a year, especially if the group is not too large. In this way, you can introduce fresh perspectives and keep the group invigorated.

Consider letting the associates plan the meeting agenda and run the meeting once or twice a year. They typically come up with terrific ideas that reenergize the group. Invite a client to speak to the group on trends in their industry or their business (mentioned above also).

Set Your Practice Group Up for Success

While some lawyers consider meetings a part of unnecessary bureaucracy, well-run meetings are critical to having a cohesive, motivated group aligned with one other and the firm. If you follow the pointers above, you should be able to conduct highly effective and interesting meetings. Also, consider reading Patrick Lencioni's book, Death by Meeting. It has some great ideas to make meetings both dynamic and effective.

The Practice Group Leader's Handbook for Success, considered a classic by many PGLs who have read it over the years, includes pointers on effective meetings and much more. It will be updated next year, but much of the content is timeless and applies to every PGL getting started in their role or learning some new approaches.

When you take the time to cultivate great meetings, you'll find that group members look forward to each event and leave with a renewed commitment to the practice.